SURVEY OF
BYWARD MARKET AREA MERCHANTS

REVIEW OF THE EFFECTS OF BY-LAW #202-81

FOR THE

City of Ottawa

URBAN SPACE FUTURES LIMITED

OCTOBER, 1981

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INTRODUCTION

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A. BACKGROUND

As of July 8, 1981, the City of Ottawa's By-law (#202-81) allowing retail business establishments within the Byward Market area to remain open on Sundays and statutory holidays between the hours of 10:00am and 6:00pm came into effect. This by-law had given the retail business establishments within the Byward Market area the option of being open any or all of the fourteen extra business days, terminating on the last Sunday in the month of September.

The rationale behind the adjustment of business hours was a desire on the part of the City of Ottawa to encourage the development of the Byward Market area as a primary tourist destination during the peak tourist season within the Regional Municipality of Ottawa-Carleton.

Specifically, By-law #202-81 was intended to address the lack of an appropriate focus for tourist activity in downtown Ottawa on summer Sundays.

B. STUDY OBJECTIVE

The objective of the study is to review the matter of the Sunday opening hours in the Byward Market area, presently exempted from the provisions of the Retail Business Holiday Act, R.S.O., 1975 (second session), Chapter 9, pursuant to Section 4 thereof.

C. APPROACH

In order to fulfill the objectives of the study, two surveys have been carried out. The first and larger of the two involved the interviewing of an attempted 100% sample of all retail and eating establishments in the Byward Market area (see Map 1). The second survey incorporated a total of 31 personal interviews from among the artisans located in the Market Building and assorted outdoor gardeners and vendors in the "heart" of the Byward Market: the east and west sides of the Byward Square and the north side of George Street, adjacent to Byward Square (see Map 2).

The surveys have assertained the following information:

1. Which business establishments in the Byward Market area have always been allowed to open on Sundays and which have only been permitted to open on Sundays since the implementation of By-law #202-81.

2. The extent to which Byward Market area merchants take advantage of the temporary by-law.

3. The perceived influence of By-law #202-81 on Sundays / holiday business for those enterprises which were previously permitted to do business on Sundays / holidays.

4. The hours of operation on Sundays / holidays for those businesses which chose to take advantage of the new by-law this summer.

5. The ranking of Sundays / holidays sales volume for market area businesses in comparison with other days of the week.

6. The effect of Sunday and holiday openings in the market area on weekly business volume.

7. The reasons behind the decision of those entrepreneurs who chose not to open on the permitted Sundays and holidays since July 8.

8. The negative and positive aspects of the by-law, according to the merchants of the Byward Market area.

9. Future Sunday / holiday opening plans, if a similar by-law is implemented next year.

10. The extent to which Byward Market merchants would like to see a by-law allowing Sunday / holiday openings become a permanent feature of the Byward Market area, and the suggested time period during the year that this would be desireable.

MAP 1
BYWARD MARKET SURVEY #1 -- RETAIL MERCHANTS
SURVEY AREA - Pertaining to By-law #202-81
1"=200'
SUSSEX
PARENT
DALHOUSIE
MACKENZIE
BY WARD MARKET
FREIMAN
WILLIAM

11. General comments from the merchants both directly and indirectly related to temporary By-law #202-81.

D. METHOD

1. Byward Market Survey #1

Personal interviews were attempted between September 21 and 25, 1981, by one staff member of Urban Space Futures Limited with all retail business establishments in the Byward Market area -- as defined by the City of Ottawa (see Map 1).

Of the 103 Byward Market area retail businesses approached, a sum of 100% provided some or all of the information requested, representing a 97% response rate. Only three(3) establishments refused any input to the questionnaire. More than 80% of the questionnaires were completed with or by the owner.

Furthermore, it should be noted that approximately 80% of the completed questionnaires were a result of personal interviews with the owner or manager of the business establishment. In the remaining cases, the questionnaire had to be dropped-off and the completed form retrieved later. However, in most of these cases, the results were reviewed by the interviewer with the owner or manager and further general comments canvassed.

While most interviews lasted between five(5) and ten(10) minutes, many discussions ensured for an additional five(5) or ten(10) minutes during which wider aspects of the temporary by-law -- its application and consequences -- were often brought forward by the interviewee. It was endeavoured that these comments be included in the 'general comments' section of the questionnaire results.

2. Byward Market Survey #2

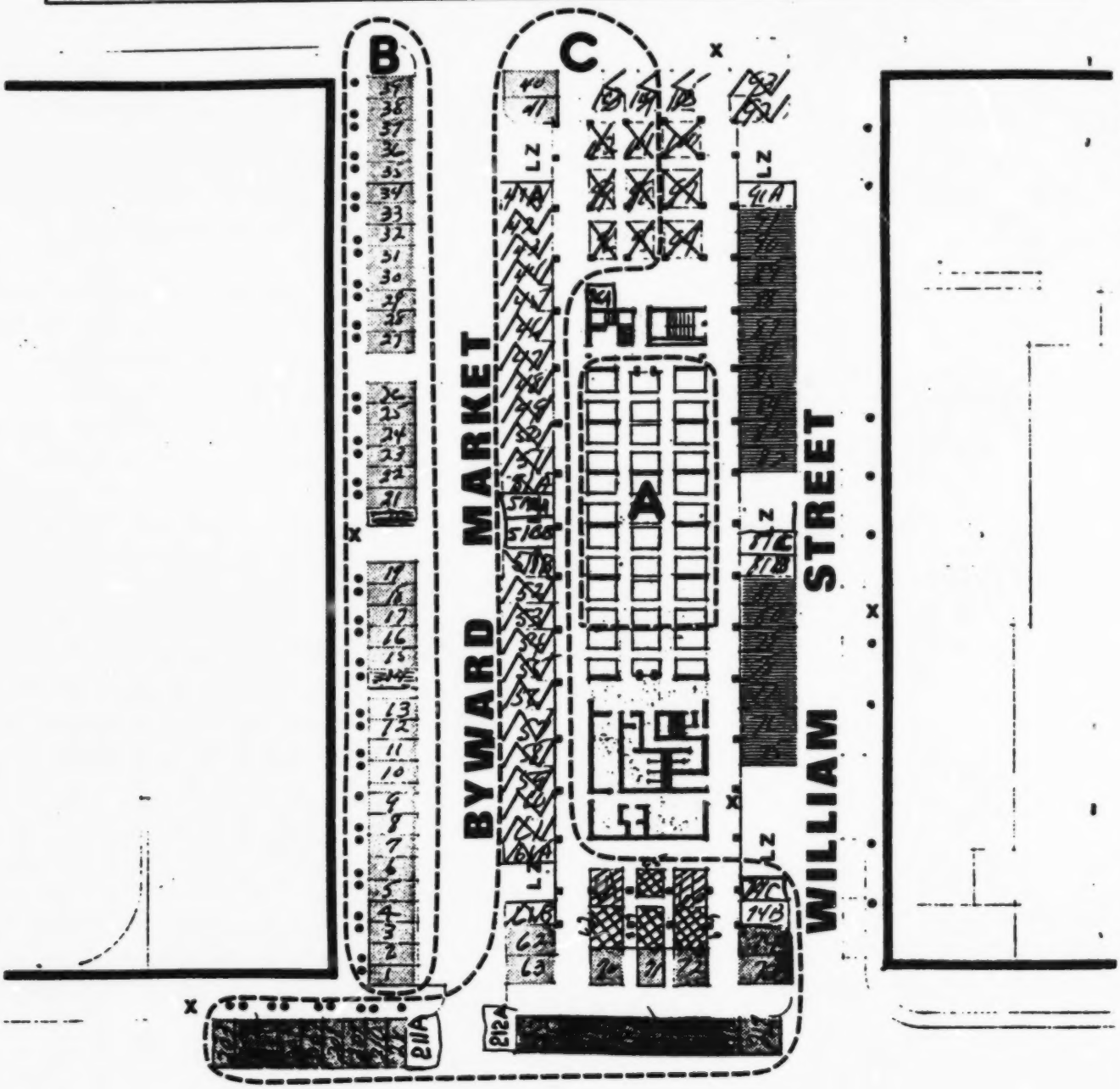
The second survey was composed of 31 interviews from among the artisans, growers, and vendors situated in the Byward Square and the adjacent Market Building(see Map 2). As noted previously, it was deemed advantageous to differentiate

MAP 2

BYWARD MARKET SURVEY #2 -- ARTISANS, GROWERS, VENDORS

A -Market Building (Artisans)
B -Byward Square west (majority growers)
C -Byward Square east and George St. north (majority vendors)

1"= 50'



between the artisans in the market building, the "growers" in the west side of Byward Square, and the "vendors" (hucksters) on the east side of Byward Square and the north side of George Street. Within these three(3) groupings a random selection process was undertaken to determine which merchants were to be interviewed: Ten(10) of the indoor artisans of the Market Building, ten(10) of the "majority growers" of Byward Square west, and eleven(11) of the "majority retailers" of Byward Square east and George Street north. While the differentiation between the outdoor "growers" and "retailers"(vendors) may not seem obvious or important to most observers of the Byward Market, it is an important one to make -- as the questionnaire results confirm. It must be stressed, however, that most of the so-called "growers" or "gardeners" on the west side of the Byward Square also engage in some retailing of produce that is not locally grown. Conversely, some of the merchants labelled as "hucksters" on the east side of the Byward Square do sell locally grown produce, some from the merchants' own farms. Also, included in the sample of "mostly retailers" along Byward Square east and George Street north are a few flower and plant merchants.

The length of the interviews for the second market survey averaged anywhere between five(5) and fifteen(15) minutes, depending on the interest of the merchant being interviewed. Approximately 20% of the interviews were carried out in French.

BYWARD MARKET SURVEY #1

BYWARD MARKET AREA RETAIL BUSINESSES

Number of Businesses .	103
Refused Interviews ...	- 3
TOTAL:	100

1. CATEGORIZATION OF RETAIL OPERATIONS SAMPLED*

QUESTION #1: Which of the following categories does this business fall into with respect to Sunday and Statutory Holiday openings? ---(check 'A' or 'B')---

REF	CATEGORIES	% OF TOTAL SAMPLE	# OF TOTAL SAMPLE
A	You have always been allowed to be open on Sundays and Statutory Holidays?	42	42
B	You have only been allowed to open on Sundays and Statutory Holidays since last July 8, when By-law #202-81 came into effect?	58	58
	TOTAL:	100%	100

NOTE (*): Excludes Wholesalers and Taverns prohibited from Sunday openings.

(i) Less than half (42%) of all Byward Market area business establishments have always been allowed to be open on Sundays and holidays. Most of these businesses are restaurants and cafés, but also include a number of art galleries, antique shops and small food stores (these businesses will be referred to as Category 'A').

(ii) The majority of businesses in the Market were only allowed to be open on Sundays and holidays between July 8th and the end of September, 1981, with the implementation of temporary By-law #202-81 (henceforth, these businesses will be referred to as Category 'B').

2. EXTENT OF SUNDAY / HOLIDAY OPENINGS

QUESTION #2: How many Sundays and Statutory Holidays were you open this summer --- since July 8?
---(maximum =*13)---

REF	BUSINESS CATEGORY	% DISTRIBUTION # OF SUNDAYS & HOLIDAYS OPEN FOR BUSINESS					TOTAL (%)	TOTAL (#)
		0	13	9-12	5-8	1-4		
A	Of those businesses that were previously allowed to be open on Sundays and Holidays	48	36	7	2	7	100%	42
B	Of those businesses that have only been allowed to open on Sundays and Holidays since the implementation of By-law #202-81	81	9	9	ø	1	100%	58
	TOTAL:	67	20	8	1	4	100%	100

NOTE(*): *Maximum of 13 days at time of interview. One Sunday remaining in By-Law period.*

(i) About 67% of all business establishments in the Byward Market area were not open for any Sunday or holidays between July 8th and the time of survey during the second last week of September. About 20% of the Market businesses were open for all the Sundays and holidays and a further 8% were open for nine(9) to twelve(12) Sundays and/or holidays.

(ii) Almost half (48%) of those businesses in the Market that were previously permitted to be open on Sundays and holidays were in fact, not open for any of the permitted days. For the most part, these were the smaller food stores and art galleries mentioned on the previous page. About 36% of this grouping of Market area business establishments were open for all of the subject Sundays and holidays, and a further 7% were open for between nine(9) and twelve(12) of the maximum of 13 days at the time of the survey. The fact that some of Category 'A' businesses chose to open for between one(1) and eight(8) days suggests By-law #202-81 had an indirect effect on some businesses which hadn't previously been open on Sundays though legally they have always been entitled to.

(iii) The great majority (81%) of those Market business which only became eligible to open on Sundays after July 8th, chose not to open for any of the newly permitted business days. About 9% were open for all of these extra days, and another 9% chose to open for between nine(9) and twelve(12) of the subject Sundays/holidays.

3.A. INFLUENCE OF BY-LAW #202-81 ON SUNDAY / HOLIDAY BUSINESS (FOR THOSE BUSINESS WHICH HAVE ALWAYS BEEN ALLOWED TO OPEN ON SUNDAY)

QUESTION #A-3(a): As a result of other stores being open on Sundays and Statutory Holidays, would you say your own business volume on Sundays and Statutory Holidays was: ---(on average)---

CATEGORY	%	#
Lower than before ..	0	0
The same as before .	45	10
Higher than before .	50	11
No response	5	1
TOTAL:	100%	22

QUESTION #A-3(b): If lower or higher, by how much? ---(in percentage terms; on average)---

AVERAGE INCREASE: 21.9% *(of which 36% experienced increases of 10% or less)*

AVERAGE DECREASE: 0%

(i) Exactly one half of the Market area businesses which have always been permitted to open on Sundays stated that their business volume on these days and holidays had increased as a result of By-law #202-81, which allowed all stores in the Byward Market to be open on Sundays and holidays between July 8th and the end of September 1981.

(ii) Slightly less than half (45%) said that their business on Sundays and holidays was not noticeably affected by the new store openings. No retail business stated that their business volume had declined as a consequence of this By-law.

(iii) The average increase stated was 21.9% over previous Sundays and holidays. It should be noted a high proportion (36%) of these stated increases were of 10% or less.

3.B. SUNDAY BUSINESS HOURS (FOR THOSE BUSINESSES THAT HAD ONLY BEEN ALLOWED TO OPEN ON SUNDAYS AND STATUTORY HOLIDAYS SINCE BY-LAW #202-81 CAME INTO EFFECT)

QUESTION #B-3: What hours did you remain open?

TIME FRAMES	%
9:00am - 5:00pm	10
10:00am - 4:00pm	10
10:00am - 5:00pm	10
10:00am - 5:30pm	20
10:00am - 6:00pm	20
11:00am - 4:00pm	10
11:30am - 4:30pm	10
12:00pm - 5:30pm	10
TOTAL:	100%

NOTE: *Total number of surveys = 11*

Due to the trial nature of the By-law, it is not surprising that there were a wide variety of Sunday/holiday opening hours reported by those businesses that have only been allowed to open on these days since July 8th, 1981. However, it can be seen that 50% of these retail merchants were open between 10:00am and 5:00pm or 6:00pm.

4. RANKING OF SUNDAY BUSINESS VOLUME

QUESTION #4: We would like to find out how effective the Sunday/ Holiday opeing was. Could you please tell me how you would rank your sales volume (on Sundays/Holidays) compared to other days of the week?
---(rank on scale of 1 to 7)---

REF	CATEGORY	PERCENTAGE DISTRIBUTION 1ST	2ND	3RD	4TH	5TH	6TH	7TH	NO RESPONSE	TOTAL (%)	TOTAL (#)
A	For those businesses that were previously allowed to be open on Sundays and Holidays	Ø	4	14	36	4	18	14	10	100%	22
B	For those businesses that have only been allowed to open on Sundays and Holidays since the implementation of By-law #202-81	20	40	Ø	20	Ø	Ø	Ø	20	100%	11
For All Businesses In The Market That Have Been Open On Sundays And Holidays		6	16	9	31	3	13	9	13	100%	33

(i) About 29% of all retail businesses in the Market area that have been open on Sundays and holidays, have, on the average, found Sundays to rank fourth as a business day -- in terms of sales volume. About 15% felt it was their second best day, while only 6% thought it was their best. Only 9% stated that Sundays/holidays were the worst days of the week in terms of sales.

(ii) The ranking of Sunday/holiday business takes on a less varied pattern when the two(2) categories are compared. Half of Category 'A' businesses found Sunday/holiday business to be their third or fourth best of the week, and a substantial proportion (32%) thought it to be their worst or second worst.

(iii) On the other hand, for those businesses which have only been permitted to open on Sundays/holidays since July 8th, 55% stated that these were their first or second best days of the week in terms of sales volume. Not one business in Category 'B', which opened during any or all of these newly permitted business days said that they would rank the sales volume lower than fourth highest on a daily comparison basis.

5. EFFECT OF SUNDAY AND HOLIDAY OPENINGS ON WEEKLY BUSINESS VOLUME (STORES OPEN VERSUS STORES CLOSED)

QUESTION #5(a): What has been the result of the new Sundays and Holiday openings in the market on your weekly business volume?

BUSINESS CATEGORY	PERCENTAGE DISTRIBUTION				TOTAL (%)	TOTAL (#)
	INCREASE	DECREASE	NO CHANGE	NO RESPONSE		
For those businesses that didn't open on Sundays and Holidays	9	Ø	81	10	100%	67
For those businesses that were open on Sundays and Holidays	52	3	39	6	100%	33

QUESTION #5(b): If there was an 'increase' or 'decrease', by how much? ---(in percentage terms; on average)---

BUSINESS CATEGORY	% DISTRIBUTION	
	AVERAGE INCREASE	AVERAGE DECREASE
For those businesses that didn't open on Sundays and Holidays	19(1)	Ø
For those businesses that were open on Sundays and Holidays	28(2)	5

NOTE (1) = 50% of these increases were 20% or more.
(2) = 56% of these increases were 20% or more.

QUESTION #5:

This question was asked to determine the effect of By-law #202-81 on the weekly business volume on stores that did not open on Sundays/holidays as well as those that were.

(i) About 81% of those businesses that didn't open on Sundays/holidays after July 8th found that the new Sundays and holiday openings in the market had no perceptable influence on their weekly business volume. A small proportion (9%) thought that the new openings in their vicinity indirectly resulted in an increase in their weekly business volume. This was deemed to have happened because of Sunday browsers "discovering" businesses for the first time in the market and then returning another day of the week to patronize their establishments.

The average increase noted by these merchants was 19% on a weekly basis, from the period before July 8th, 1981.

(ii) In contrast, about half of those businesses surveyed which were open on Sundays and holidays since July 8th thought that their weekly business volume had increased as a consequence (in other words, they were not just doing six days business in seven -- thought to be a possible result of this By-law). Furthermore, the average increase stated by this category of retail businesses was almost 30% over previous weekly business volumes. A very small proportion of this category felt that their weekly business volume had declined as a result of the new By-law. Most of the remainder saw no apparent change in their weekly business volume as a consequence of By-law #202-81.

6. REASONS FOR NOT OPENING ON SUNDAYS FROM THOSE MERCHANTS WHO DIDN'T

QUESTION #6: (IF APPLICABLE) Why were you not open this summer on Sundays and Statutory Holidays?

CATEGORY OF REASONS GIVEN	% OF TOTAL COMMENTS RECEIVED	TOTAL (#)
1. Too many hours already	3	
- Don't want to open Sundays	13	
- Need a day off	34	
SUB-TOTAL:	50%	34
2. Not advantageous	7	
- No Sunday business anticipated	7	
- Not profitable for Sunday openings .	9	
- Business not suitable for Sunday ...	9	
SUB-TOTAL:	32%	22
3. Staffing problems	12	
4. Disagree with by-law	2	
5. No need to open except for greed ...	2	
6. Didn't know about the by-law	2	
SUB-TOTAL:	18%	11
GRAND TOTAL:	100%	67

(i) The most commonly stated reason for not opening on the permitted Sundays/holidays after July 8th was that the owner and staff worked enough hours already and needed a day off.

(ii) About 32% of the responses to this question suggest that many proprietors chose not to open on the permitted Sundays/holidays because it was anticipated that business would not be profitable for them, or that they felt their businesses were not suited to the Sunday shopping clientele circulating in the market.

(iii) About 12% of all responses to this question suggested staffing problems associated with potential Sunday openings were a major reason for deciding not to open.

7. POSITIVE BY-LAW COMMENTS (TOTAL OF 100)

QUESTION #7: What do you like about this By-law?

CATEGORY OF COMMENT RECEIVED	% OF TOTAL COMMENTS RECEIVED
1. It was a good/great/excellent idea .	49
2. It was good for the tourists	12
3. Allowed businesses to be open if they wanted to be	12
4. Neutral/no objection to By-law	11
5. Good for open businesses/businesses that chose to open	8
6. Increased market activity/traffic on Sundays	8
TOTAL:	100%

NOTE: Total number of surveys = 100

(i) The most common response to this question was just a simple statement of approval of the By-law.

(ii) About 12% of the comments received to this question noted the beneficial impact of the By-law for tourists to the city, helping to create an attractive tourist destination for tourists to Ottawa on Sundays.

(iii) An additional 12% of the total comments received suggested that a positive aspect of the By-law was its flexibility; it gave the merchants the option of opening.

8. NEGATIVE BY-LAW COMMENTS (TOTAL OF 22)

QUESTION #8: What did you dislike about this By-law?

CATEGORY OF COMMENT RECEIVED	% OF TOTAL COMMENTS RECEIVED
1. Disapprove of Sunday openings	31
2. Not fair to other stores in city ...	18
3. By-law term too short	14
4. Not fair to employees	9
5. Implemented too quickly and without proper consultation	9
6. Neutral on issue	9
7. City did not advertise	5
8. By-law discredits the market	5
TOTAL:	100%

NOTE: Total number of surveys = 22

(i) The most significant observation to be made here is that this question generated only about one fifth the number of comments as the preceeding question which canvassed positive comments about the By-law.

(ii) About 31% of all the responses to this question were simple statements of disapproval of the By-law (eg. "I don't like it").

(iii) Interestingly, 18% of the comments received conveyed the opinion that By-law #202-81 was unfair to other stores in the city, since the By-law was limited to the Byward Market area.

(iv) It should be pointed out that comments #3, 5, and 6 are not condemnations of the overall intent of the By-law, but reveal some of its short comings.

9. FUTURE SUNDAY OPENING PLANS

QUESTION #9: (IF APPLICABLE) Will you open up next year if a similar By-law is passed?

REF	BUSINESS CATEGORIES (ABILITY TO OPEN SUNDAYS)	(OPEN OR CLOSED)	PERCENTAGE DISTRIBUTION YES	NO	UNSURE	NO RESPONSE	TOTAL (%)	TOTAL (#)
A	Of those who have always been allowed to open on Sundays	-were open this summer ...	91	Ø	4.5	4.5	100	22
		-were not open this summer	15	60	10	10	100	20
		BOTH:	54%	29%	10%	7%	100%	42
B	Of those who have only been allowed to open on Sundays since By-law #202-81 came into effect	-were open this summer ...	90	Ø	10	Ø	100	11
		-were not open this summer	13	57	26	4	100	47
		BOTH:	26%	47%	23%	4%	100%	58
		OF THE TOTAL SAMPLE:	38%	39%	17%	5%	100%	100

(i) Of the total sample of businesses surveyed an equal proportion said they would open next year as those who said they wouldn't. A further 17% were unsure, while 5% were unable to respond to this question.

The variation in the responses to this question are evident when the businesses are grouped according to their ability to open Sundays and whether they were in fact open or closed after July 8th on Sundays.

(ii) In comparing Categories 'A' and 'B', regardless of their record of Sunday openings since July 8th, it can be seen that many more of Category 'A' (those businesses that have always been allowed to be open on Sundays) stated that they would be open next year on Sundays if a similar By-law is passed than Category 'B'. However, the larger proporiton of unsure responses from Category 'B' businesses suggests that many businesses that didn't open this summer on Sundays would like to consider the option of being open next year, if circumstances are favourable and their own individual business obstacles can be overcome.

(iii) The most significant answers to this question are from those businesses in both Categories 'A' and 'B' that were open this summer. Not one business that opened on Sundays after July 8th, regardless of its previous record, stated that it would not open next year if a similar By-law is passed.

10.A. SUNDAY OPENINGS AS A PERMANENT MARKET FEATURE

QUESTION #10(a): Would you like to see the By-law become a permanent feature of the Byward Market?

REF	BUSINESS CATEGORY	% DISTRIBUTION YES	NO	UNSURE	TOTAL (%)	TOTAL* (#)
A	Of those who have always been allowed to open on Sundays ...	87	11	2	100	38
B	Of those who have only been allowed to open on Sundays since By-law #202-81 came into effect	62	19	19	100	54
	OF THE TOTAL SAMPLE:	73%	15%	12%	100%	92

NOTE (*): Excludes blank responses.

(i) Of the total sample of retail businesses surveyed in the Byward Market area, 73% expressed a desire to see a By-law allowing Sunday openings become a permanent feature of the Byward Market.

(ii) When the two(2) business categories are compared for this question, it is apparent that those enterprises which have always been allowed to open on Sundays (Category 'A') are in greater favour of seeing this By-law on a permanent basis. Nevertheless, the majority of Category 'B' businesses are also in favour of such a By-law.

10.B. SUGGESTED SUNDAY OPENING PERIODS

QUESTION #10(b): If 'YES', specify the time period.

REF	BUSINESS CATEGORY	% DISTRIBUTION OF SUGGESTED SUNDAY OPENING PERIOD						TOTAL (%)	TOTAL (#)
		JULY 1-OCT 1	JUNE 1-LABOUR DAY	ALL YEAR	MAY OR JUNE-OCT	MAY/JUNE TO XMAS	OTHER		
A	Of those who have always been allowed to open on Sundays	0	12	44	17	15	12	100	34
B	Of those who have only been allowed to open on Sundays since By-law #202-81 came into effect	0	13	34	34	3	16	100	33
	OF THE TOTAL SAMPLE:	0%	12%	39%	26%	9%	14%	100%	67

(i) A wide variety of responses were received for this question, which must be interpreted in relation to the results of Question #10.A. When the total sample of responding businesses is regarded, it is apparent that the most popular suggestion for a future Sunday/holiday opening period is the full year -- almost 46% of the respondents suggested this time frame. The second most popular period was from May or June until October -- late spring to early fall.

(ii) In looking at the suggestions of only those businesses which have always been allowed to open on Sundays (Category 'A'), one can see that the full year is by far the most popular option put forward. As in the overall sample, May or June to October was the second most popular period suggested, though 15% felt the time frame for Sunday/holiday openings should extend all the way to Christmas.

(iii) In contrast, very few enterprises from Category 'B' thought a By-law allowing Sunday openings should extend from May or June to Christmas. An equal proportion of this group (34%) supported a time frame of all year and May or June to October.

11. MERCHANT ASSOCIATION REPRESENTATION

QUESTION #11: Do you belong to any merchant groups?

MERCHANT GROUPS	% OF TOTAL SAMPLE
Byward Market Merchants Association .	22
The Market Village Association	12
Clarence Street Merchants Association	10
None / Don't Know / No Response	56
TOTAL:	100%

NOTE: Total number of surveys = 100

QUESTION #12:

GENERAL COMMENTS

CATEGORY 'A' - (THOSE BUSINESSES THAT WERE PREVIOUSLY ALLOWED TO BE OPEN ON SUNDAYS AND HOLIDAYS)

1. All city stores in city should be open, not just market stores (on Sunday's).
2. A minimum of 50% of shops should be open.
   - some businesses, because of their nature, will only do 6 days business in 7.
3. Whatever business under 2,200 sq ft and employ less than 3;
   - if dairy, produce, and vegetables
   - as many as you want.
4. Draws people to market who might not otherwise come.
5. Need street light improvements and market identification signs on Clarence St.
6. Should remain optional.
7. It is a commendable by-law, good for the merchants.
8. Sunday's crowd is a totally different crowd from Saturday and Monday through Friday;
   - from the suburbs
   - good parking.
9. Would prefer this by-law being optional instead of permanent.
10. Hucksters shouldn't have been parachuted in;
    - in order to preserve the market, there should be a separation between growers (best location) and hucksters (pretenders).
11. Should continue it next year -- necessary in a growing city.
12. To promote market business, it should occur until Christmas.
13. Should remain optional.
14. Excellent by-law;
    - need to encourage artists and musicians to play in market on Sundays
    - Organize the market so it becomes a real Sunday focus in Ottawa.

QUESTION 12: (CONTINUED)

GENERAL COMMENTS

CATEGORY 'B' - (THOSE BUSINESSES THAT HAVE ONLY BEEN ALLOWED TO OPEN ON SUNDAYS AND HOLIDAYS SINCE THE IMPLEMENTATION OF BY-LAW #202-81)

1. By-law has livened-up the market;
   - very cosmopolitan.
2. Doesn't think non-food stores should be allowed to be open on Sunday;
   - farmers and venders should be in separate places.
3. Survey should have been done before implementation of by-law.
4. Just do 6 days business in 7.
5. Once Rideau centre opens it may be viable to be open all year.
6. Once Rideau Centre opens it may be viable to be open all year.
7. Should remain optional.
8. Does not want to see a compulsary by-law -- should be optional (marginal operations);
   - need to regulate prostitution.
9. All Ottawa merchants should have the options of being open on Sundays.
10. Should be advertised better so that tourists especially know about the market being open on Sunday.
11. By-law should be voluntary and for market area only.
12. Keep it flexible and optional.
13. City could do more for the merchants by improving the parking arrangement.
14. Council should have consulted the merchants prior to enacting the law;
    - whole city shouldn't be open Sunday.
15. Should get 80% of all businesses to agree on Sunday opening.
16. Sunday and holiday openings appeared to have been very convenient to many visitors to the area, particularly those on weekend tours.
    There were many positive comments, however, some visitors from the United States felt that they did not receive a fair exchange for their dollars and that some prices were especially inflated for the Sunday Trade.
    Perhaps this aspect could be addressed as a public relations exercise.
17. We are uncertain that it would be profitable to remain open on Sundays. However, if a by-law should pass, perhaps everyone should be closed one day a week (Monday or Tuesday, or Wednesday). This added day is very trying on staff and it's almost useless to train a new staff for one day a week.
    - This by-law was a deterrent in the long run for our company; we required extra staff for surveillance of browsers; much breakage occurred; the net result is a loss.

QUESTION 12: (CONTINUED)

GENERAL COMMENTS

CATEGORY 'B' - (THOSE BUSINESSES THAT HAVE ONLY BEEN ALLOWED TO OPEN ON SUNDAYS AND HOLIDAYS SINCE THE IMPLEMENTATION OF BY-LAW #202-81)

18. I obviously am in favor of continuing Sunday openings. It gives me an opportunity to hire more students in the summertime; it is a particular boon to my garden furniture business which is seasonal and we find a good number of tourists shop Sundays plus a new crowd of people in the market over and above our 'regulars'. There are always a fair number of people having lunch or brunch in the market and I would think we benefit each other in having restaurants and boutiques open. We would probably lengthen our hours next year. This summer has been a very profitable experiment for us and met with great enthusiasm by the public.

SAMPLE

BYWARD MARKET AREA - SURVEY #1

SIC CODE_____

NAME OF BUSINESS _____ TYPE OF BUSINESS _____

ADDRESS _____ PERSON INTERVIEWED _____

1. WHICH OF THE FOLLOWING CATEGORIES DOES THIS BUSINESS FALL INTO WITH RESPECT TO SUNDAY AND STATUTORY HOLIDAY OPENINGS? --------CHECK (A) or (B)--------

A

☐ YOU HAVE ALWAYS BEEN ALLOWED TO OPEN ON SUNDAYS AND STATUTORY HOLIDAYS?

2. ☐ HOW MANY SUNDAYS AND STATUTORY HOLIDAYS WERE YOU OPEN THIS SUMMER - SINCE JULY 8?

(If "None" 0 - go to QUESTION 5)

3. ☐ lower ☐ same ☐ higher AS A RESULT OF OTHER STORES BEING OPEN ON SUNDAY AND STATUTORY HOLIDAYS, WOULD YOU SAY YOUR OWN BUSINESS VOLUME ON SUNDAYS AND STATUTORY HOLIDAYS WAS (ON AVERAGE)?

☐ IF "LOWER" OR "HIGHER", BY HOW MUCH? (IN PERCENTAGE TERMS - ON AVERAGE)

GO TO QUESTION #4

B

☐ YOU HAVE ONLY BEEN ALLOWED TO OPEN ON SUNDAYS AND STATUTORY HOLIDAYS SINCE LAST JULY 8, WHEN BY-LAW #202-81 CAME INTO EFFECT?

2. ☐ HOW MANY SUNDAYS AND STATUTORY HOLIDAY WERE YOU OPEN THIS SUMMER - SINCE JULY 8?

(If "None" 0 - go to QUESTION 5)

3. WHAT HOURS DID YOU REMAIN OPEN?

☐ 10:00 a.m. - 6:00 p.m.

☐ Other (Specify)

4. WE WOULD LIKE TO FIND OUT HOW EFFECTIV THE HOLIDAY OPENING WAS. COULD YOU PL TELL ME HOW YOU WOULD RANK YOUR SALES VOLUME COMPARED TO OTHER DAYS OF THE W

☐ (rank on SCALE of 1 to 7)

COMMENTS: _____

5. ☐ increase ☐ decrease ☐ no change WHAT HAS BEEN THE RESULT OF THE NEW SUNDAYS AND HOLIDAY OPENINGS ON YOUR WEEKLY BUSINESS VOLUME?

☐ % IF THERE WAS AN "INCREASE" OR "DECREASE", BY HOW MUCH? (IN PERCENTAGE TERMS - ON AVERAGE)?

6. WHY WERE YOU NOT OPEN THIS SUMMER ON SUNDAYS AND STATUTORY HOLIDAYS? (IF NOT APPLICABLE - GO TO QUESTION #7) COMMENTS: _____

7. WHAT DID YOU LIKE ABOUT THIS BY-LAW? COMMENTS: _____

8. WHAT DID YOU DISLIKE ABOUT THIS BY-LAW? COMMENTS: _____

9. WILL YOU OPEN UP NEXT YEAR IF A SIMILAR BY-LAW IS PASSED? (IF APPLICABLE)

CHECK ONE ONLY

- ☐ yes
- ☐ no
- ☐ unsure

10. WOULD YOU LIKE TO SEE THE BY-LAW BECOME A PERMANENT FEATURE OF THE BYWARD MARKET?

- ☐ yes
- ☐ no
- ☐ unsure

IF "YES" SPECIFY THE TIME PERIOD

- ☐ JUNE 1st to LABOUR DAY
- ☐ JULY 1st to OCTOBER 1st
- ☐ OTHER (Specify)

11. DO YOU BELONG TO ANY MERCHANT GROUPS? PLEASE LIST

(i) _____

(ii) _____

12. GENERAL COMMENTS

(OVER)

BYWARD MARKET SURVEY #2

	SAMPLE
A. MARKET BUILDING (Artisans)	10
B. BYWARD SQUARE WEST (majority growers)	10
C. BYWARD SQUARE WEST & GEORGE ST. NORTH (majority retailers)	10
TOTAL:	30

1. EXTENT OF SUNDAY / HOLIDAY OPENINGS?

QUESTION #1: How many Sundays and Holidays were you open this summer - since July 8? ---(maximum = 13*)---

REF	GROUP	PERCENTAGE DISTRIBUTION NUMBER OF SUNDAYS & HOLIDAYS OPEN FOR BUSINESS						SAMPLE SIZE (#)
		0	13	9-12	5-8	1-4	TOTAL	
A	Market Building (Artisans)	ø	50	40	10	ø	100%	10
B	Byward Square West (majority growers) .	100	ø	ø	ø	ø	100%	10
C	Byward Square East & George St. North (majority retailers)	10	40	40	10	ø	100%	10

NOTE (*): As of September 25, 1981 -- with one Sunday remaining in By-Law period.

2. SUNDAY AND HOLIDAY BUSINESS HOURS

QUESTION #2: What hours did you remain open? ---(if applicable)---

REF	GROUP	TIME FRAMES (% DISTRIBUTION) 10:00am - 6:00pm	10:00am - 5:00pm	9:30am - 5:00pm	8:00am - 5:00pm	OTHER HOURS	TOTAL	SAMPLE SIZE (#)
A	Market Building (Artisans)	90	Ø	Ø	Ø	10	100%	10
B	Byward Square West (majority growers) .	Ø	Ø	Ø	Ø	Ø	Ø%	Ø
C	Byward Square East & George St. North (majority retailers)	11	34	22	22	11	100%	9

NOTE: Excludes any businesses which were not open any Sundays / Holidays.

3. RANKING OF SUNDAY AND HOLIDAY BUSINESS VOLUME

QUESTION #3: We would like to find out how effective the Sunday/ Holiday opening was.. Could you please tell me how you would rank your sales volume (on Sunday/Holidays) compared to other days of the week?
---(if applicable - rank on scale of 1=highest to 7=lowest)---

REF	GROUP	SUNDAY/HOLIDAY RANKING (% DISTRIBUTION) 1ST	2ND	3RD	4TH	5TH	6TH	7TH	NO RESPONSE	TOTAL	SAMPLE SIZE (#)
A	Market Building (Artisans)	Ø	80	Ø	Ø	Ø	20	Ø	Ø	100%	10
B	Byward Square West (majority growers) .	Ø	Ø	Ø	Ø	Ø	Ø	Ø	100	Ø%	10
C	Byward Square East & George St. North (majority retailers)	10	30	40	Ø	10	Ø	Ø	10	100%	10

NOTE: Excludes businesses which were not open any Sundays/Holidays.

4. EFFECT OF SUNDAY / HOLIDAY OPENINGS ON WEEKLY BUSINESS VOLUME

QUESTION #4(a): What has been the result of the new Sundays and Holiday openings in the market area on your weekly business volume?

REF	GROUP	PERCENTAGE DISTRIBUTION				SAMPLE SIZE (#)
		INCREASE	DECREASE	NO CHANGE	TOTAL	
A	Market Building (Artisans)	70	10	20	100%	10
B	Byward Square West (majority growers) .	Ø	40	60	100%	10
C	Byward Square East & George St. North (majority retailers)	70	Ø	30	100%	10

QUESTION #4(b): If there was an "increase" or "decrease", by how much? ---(in percentage terms - on average)---

REF	GROUP	AVERAGE INCREASE (%)	MEDIAN INCREASE (%)	AVERAGE DECREASE (%)	MEDIAN DECREASE (%)
A	Market Building (Artisans) ..	31	30	N/A	N/A

NOTE: *Results for #4(b), groups 'B' and 'C', are not included since the vast majority of these merchants were not able to estimate the percentage change in their weekly business volume.*

5. REASONS FOR NOT OPENING ON SUNDAYS / HOLIDAYS (FOR THOSE MERCHANTS WHO DIDN'T)

QUESTION #5: Why were you not open this summer on Sundays and Holidays?

REF	GROUP	COMMENTS (PERCENTAGE DISTRIBUTION) MON-SAT IS ENOUGH; NEED A DAY OFF	HAVE TO WORK IN THE FIELDS ON SUNDAYS	TOURISTS DON'T BUY VEGETABLES	TOTAL (%)	SAMPLE SIZE (#)
A	Market Building .... (Artisans)	Ø	Ø	Ø	Ø%	Ø
B	Byward Square West (majority growers) .	80	10	10	100%	10
C	Byward Square East & George St. North (majority retailers)	100	Ø	Ø	100%	1

NOTE: Excludes those who did open.

6. POSITIVE BY-LAW COMMENTS

QUESTION #6: What did you like about this By-law?

COMMENTS	BUSINESS GROUP (PERCENTAGE DISTRIBUTION)		
	A	B	C
	MARKET BUILDING (ARTISANS)	BYWARD SQUARE WEST (MAJORITY GROWERS)	BYWARD SQUARE EAST & GEORGE ST. NORTH (MAJORITY RETAILERS)
1. Good Idea, Like It	33	Ø	47
2. Good For Business	33	Ø	7
3. Good For Tourists	8	Ø	7
4. Chance To Sell Saturday Produce on Sunday	Ø	Ø	13
5. Good For Others/Flower Sellers/Non-Growers ...	Ø	50	13
6. Other	26	50	13
TOTAL:	100%	100%	100%
# OF COMMENTS (SAMPLE SIZE):	12	6	15

7. NEGATIVE BY-LAW COMMENTS

QUESTION #7: What did you dislike about this By-law?

COMMENTS	BUSINESS GROUP (PERCENTAGE DISTRIBUTION) A MARKET BUILDING (ARTISANS)	B BYWARD SQUARE WEST (MAJORITY GROWERS)	C BYWARD SQUARE EAST & GEORGE ST. NORTH (MAJORITY RETAILERS)
1. Day Of Rest Needed	60	29	25
2. Allows Hucksters To Take Away Business	Ø	42	Ø
3. Sunday Vegetables Are Not Fresh	Ø	29	Ø
4. Limits Friday, Saturday and Monday Trade	Ø	Ø	50
5. Not Good For Business .	20	Ø	Ø
6. Not Enough Vendors Are Open For Business Yet .	Ø	Ø	25
7. Other	20	Ø	Ø
TOTAL:	100%	100%	100%
# OF COMMENTS (SAMPLE SIZE):	5	7	4

8. FUTURE SUNDAY OPENING PLANS

QUESTION #8: Will you open up next year if a similar By-law is passed?

REF	GROUP	% DISTRIBUTION YES	NO	UNSURE	TOTAL	SAMPLE SIZE(#)
A	Market Building (Artisans)	90	10	Ø	100%	10
B	Byward Square West (majority growers) .	Ø	70	30	100%	10
C	Byward Square East & George St. North (majority retailers)	90	10	Ø	100%	10

9.A. SUNDAY OPENINGS AS A PERMANENT MARKET FEATURE

QUESTION #9(a): Would you like to see the By-law become a permanent feature of the Byward Market?

REF	GROUP	% DISTRIBUTION YES	NO	UNSURE	TOTAL	SAMPLE SIZE(#)
A	Market Building (Artisans)	80	10	10	100%	10
B	Byward Square West (majority growers) .	30	40	30	100%	10
C	Byward Square East & George St. North (majority retailers)	80	20	Ø	100%	10

9.B. SUGGESTED SUNDAY AND HOLIDAY OPENING PERIODS

QUESTION #9(b): If 'Yes' (#9-a), specify the time period.

REF	GROUP	PERCENTAGE DISTRIBUTION OF SUNDAY & HOLIDAY OPENING PERIODS							SAMP SIZ (#
		JULY 1 - OCT 1	JUNE 1 - LABOUR DAY	ALL YEAR	MAY OR JUNE - OCT	MAY/JUNE - XMAS	OTHER	TOTAL	
A	Market Building (Artisans)	Ø	50	13	13	24	Ø	100%	8
B	Byward Square West (majority growers) .	Ø	Ø	Ø	50	50	Ø	100%	2
C	Byward Square East & George St. North (majority retailers)	12	Ø	38	12	Ø	38	100%	8

QUESTION #10: GENERAL COMMENTS

A. MARKET BUILDING (Artisans):

1. Should be open on Sundays only for the summer;
   - Not against being closed Monday, if Sunday open. Monday should be optional.
2. Sundays not important day of the week.
3. Need time to create;
   - City is forcing us to be open Friday nights and Sundays.
   - City should be more understanding of the needs of the craftsmen and tenants.
   - Sunday could be a great thing for the market.
4. If Sunday is made mandatory, Monday should be optional;
   - Shouldn't be allowed to be closed two days in a row.
   - Would agree to Monday being closed completely, when Sundays are optional.

B. BYWARD WEST (Majority Growers):

1. If we were to be open Sundays, we would have to close one other day of the week;
   - The tourist don't provide us with a living, so being open on Sundays doesn't make sense.
2. Would like to sell flowers on Sundays during the spring, not vegetables.

C. BYWARD EAST & GEORGE STREET NORTH (Majority Retailers):

1. September 27; best Sunday all summer.
2. Whoever gets up on Sundays can come;
   - In summer you have to make yours dollars when you can.
3. Nothing but a benefit for the City of Ottawa.

SAMPLE

BYWARD MARKET AREA - SURVEY #2

SIC CODE_____

NAME OF BUSINESS _____ TYPE OF BUSINESS _____

LOCATION _____ PERSON INTERVIEWED _____

1. ☐ HOW MANY SUNDAYS AND STATUTORY HOLIDAYS WERE YOU OPEN THIS SUMMER - SINCE JULY 8?
(if "None" 0 - go to Question 4)

2. WHAT HOURS DID YOU REMAIN OPEN?

☐ 10:00 a.m. - 6:00 p.m.

☐ Other (Specify) _____

3. WE WOULD LIKE TO FIND OUT HOW EFFECTIVE THE HOLIDAY OPENING WAS. COULD YOU PLEASE TELL ME HOW YOU WOULD RANK YOUR SALES VOLUME COMPARED TO OTHER DAYS OF THE WEEK?

☐ (rank on SCALE of 1 to 7)

COMMENTS: _____

_____

4.

☐ increase
☐ decrease
☐ no change

WHAT HAS BEEN THE RESULT OF THE NEW SUNDAYS AND HOLIDAY OPENINGS ON YOUR WEEKLY BUSINESS VOLUME?

☐ % IF THERE WAS AN "INCREASE" OR "DECREASE", BY HOW MUCH? (IN PERCENTAGE TERMS - ON AVERAGE)?

5. WHY WERE YOU NOT OPEN THIS SUMMER ON SUNDAYS AND STATUTORY HOLIDAYS?
(IF NOT APPLICABLE - GO TO QUESTION #7) COMMENTS: _____

_____

_____

6. WHAT DID YOU LIKE ABOUT THIS BY-LAW? COMMENTS: _____

_____

_____

7. WHAT DID YOU DISLIKE ABOUT THIS BY-LAW? COMMENTS: _____

_____

_____

8. WILL YOU OPEN UP NEXT YEAR IF A SIMILAR BY-LAW IS PASSED? (IF APPLICABLE)

CHECK ONE ONLY

☐ yes
☐ no
☐ unsure

9. WOULD YOU LIKE TO SEE THE BY-LAW BECOME A PERMANENT FEATURE OF THE BYWARD MARKET?

☐ yes
☐ no
☐ unsure

IF "YES" SPECIFY THE TIME PERIOD

☐ JUNE 1st to LABOUR DAY
☐ JULY 1st to OCTOBER 1st
☐ OTHER (Specify)

10. GENERAL COMMENTS: _____

_____

_____

POOR

QUALITY

ORIGINAL